



U.S. General Services Administration

# Federal Acquisition Service

**Enhanced Monthly On-line Records and Reports  
of Information-Technology Services (E-MORRIS)**

**Training Overview**

## Federal Acquisition Service

# E-MORRIS Introduction

- E-MORRIS is GSA's system that supports billing and inventory for the Networx contracts.
- E-MORRIS enhances MORRIS functionality for Networx, but is a separate website with separate access.
  - URL: <https://emorris.fasbilling.gsa.gov>
- There are three levels of Agency access to the website:
  - Public – general info, account registration forms, reset password form
  - Agency User – inventory and billing, depending on approval of Agency DAR Admin
  - Agency DAR Administrator – Agency user, plus screens to manage other accounts
- This briefing covers the following topics:
  - Inventory and billing process overview
  - Website account registration process
  - User account set-up and navigation
  - Networx inventory screens
  - Networx billing reports
  - Manage Users screens (for Agency DAR Administrators)
  - E-MORRIS help and contact info

## Federal Acquisition Service

# Inventory and Billing Process Overview

- Inventory Process (could be daily on business days)
  - Load vendor Service Order Completion Notice (SOCN) to inventory database
  - Check against Pricer and report errors to vendor (vendor may send corrected SOCN)
  - Post inventory data to tables for web access
- Billing Process (monthly)
  - Load vendor invoice, detail billing and adjustment files to billing database
  - Balance invoice to detail to ensure accuracy of billing data
  - Run verification check for:
    - Elements populated
    - SOCN for each order; billing consistent with SOCN
    - Correct prices
    - No duplicate billing
    - No over 90 day billing
    - Exceptions feed into disputes process (centralized only) and SLA count
  - Run customer billing (centralized only)
    - Feed to IPAC process
  - Post data to tables for billing web reports
    - View/print, download data, data layout



## Federal Acquisition Service

# Home Page (public access)



GSA Info
<ul style="list-style-type: none"><li>■ MORRIS</li><li>■ TOPS e*Bill</li><li>■ TOPS Ordering</li><li>■ GSA Home</li><li>■ GSA Networkx</li><li>■ GSA TSMs (GAMs)</li><li>■ Networkx Unit Pricer</li><li>■ Networkx Agency Pricer</li></ul>
E-MORRIS Info
<ul style="list-style-type: none"><li>■ User Guide</li><li>■ FAQ</li><li>■ News</li><li>■ Contact Us</li><li>■ E-MORRIS Home</li></ul>

### E-MORRIS

Enhanced Monthly On-Line Records and Reports of Information Technology Services  
Welcome to GSA's web site for Networkx Billing and Inventory Management

#### This is a Restricted Site

You must be a registered user in order to access this website. If you are currently registered, please enter your User Name and Password to log in.

#### Login Now

User Name

Password

[Register Now](#) [Forgot Password](#) [Other Login Problems](#)

**WARNING:**  
This is a U.S. General Services Administration Federal Government computer system that is "FOR OFFICIAL USE ONLY". This system is subject to monitoring. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

### FOR DATA ACCESS:

- User ID & password required.
- **Agency users must be authorized by the Agency DAR Administrator.**
- **Agency must have a copy of the DAR Administrator letter on file with GSA.**
- 3 ways to get an account:
  - Register Now form (any user)
  - Multiple Users form (DAR Admin)
  - DAR Admin can create through web screens
- If you have an account and forget your password, click Reset Password and enter your email address.

- Links to other web sites (access controlled separately, as required)
- Links to general information about E-MORRIS



# Federal Acquisition Service

# Account Registration Screen

Information	
<p>This form registers one user for an E-MORRIS account. If you are a DAR Administrator and wish to register multiple users, please <a href="#">click here</a> to download a form.</p> <p>Please enter your contact information into the fields at the right.</p> <p>* Indicates that you must provide this information.</p> <p>Please make sure to provide a valid email address. You will be contacted at this address when your request has been processed.</p> <p>Please enter at least one Agency Hierarchy Code (AHC). You must enter at least two characters; you may enter up to 28. A partial AHC means access to all AHCs starting with those characters (e.g., "47" means you are requesting all AHCs starting with 47. If you enter 47, you don't need to enter levels that roll to it, e.g., 4712, 47001234). You may enter multiple AHCs, either</p>	
<h3>E-MORRIS Registration Request Information</h3>	
* Email Address	<input type="text" value="emorris.user@agency.gov"/>
First Name	<input type="text" value="Emorris"/>
* Last Name	<input type="text" value="User"/>
* Phone	<input type="text" value="555-555-5555"/>
Address	<input type="text" value="123 Mountain Road"/>
City	<input type="text" value="West Glacier"/>
State	<input type="text" value="MT"/>
Zip	<input type="text" value="54321"/>
* <u>Agency Hierarchy Code(s)</u>	<input type="text" value="TE01"/> <input type="text" value="TE03"/>
* <u>Module Access</u>	<input checked="" type="checkbox"/> Networkx Inventory <input checked="" type="checkbox"/> Networkx Billing
<u>Comments</u>	<input type="text" value="This is a demo request for E-MORRIS access"/>
<p>* Indicates a Required Field</p> <p><input type="button" value="Cancel"/> <input type="button" value="Submit Request"/></p>	

- o Form accessed through Register Now button on the E-MORRIS home page.
- o Submitted form populates a request table in E-MORRIS.
- o Agency DAR Administrator and GSA get a system email with request information, and can access the request through a web screen.
- o User gets a system email with UserID and password, once the DAR Admin or GSA has created the account.

## Agency Hierarchy Codes

- o Identify your requested level of data access
- o You must enter at least two characters
- o You may enter up to 28 characters
- o The more characters you enter, the more your access is restricted\*, e.g..
  - o If you enter TE, you get all AHCs starting with TE
  - o If you enter TE0000000000000000000000000000, you get only that AHC.
- o You may enter multiple AHCs (separated by ; or on a separate line)



## Federal Acquisition Service

# Multiple Users Registration Form

### Instructions:

\*\*\*\*\*You must be an Agency Transition Manager or Agency DAR Administrator to use this form.\*\*\*\*\*

Transition Managers must approve access for the Transition Information Portal (TIP).  
DAR Administrators must approve access for E-MORRIS (billing and/or inventory).

\*\*\*\*\*This form does not imply a single account for all applications. It is only a streamlined method of requesting access.\*\*\*\*\*

Please complete this form to indicate your approval for users in your agency to access GSA applications.

Check the box(es) next to Agency Transition Manager and/or Agency DAR Administrator as they apply to you.

Please include the information for yourself as the agency authorizing official (Agency Transition Manager and/or Agency DAR Administrator).

You may authorize multiple users and include them on this form.

Email the completed form to [fasbilling.help@gsa.gov](mailto:fasbilling.help@gsa.gov)

**Request Type:** For each user, check the box to Create a New Account, Modify an Existing Account or Delete an Existing Account

### Access Permissions:

#### Agency Hierarchy Codes:

E-MORRIS access is limited to the Agency Hierarchy Codes (AHCs) listed on this form.

A partial AHC means that a user gets access to all AHCs starting with those characters (e.g., an AHC of "TE" means that a user gets access to all AHCs starting with TE).

You must enter at least the first two characters. You may enter up to 28 characters.

You do NOT need to enter lower level AHCs for a user if you enter the higher levels (e.g., If you enter TE for a user, you do not need to enter TE01, TE01AB, etc).

You may enter multiple AHCs for a user if they are not levels of each other (e.g., TE01, TE03).

**Functionality:** Access implies view/print/download capabilities. There is no edit or upload functionality for these modules.

### Example completed form:

Point of Contact Information					Request Type	Access Permissions			
First Name	Last Name	Email Address	Phone Number	Agency Name		Agency Hierarchy Codes to Access List all	TIP Approval	E-MORRIS	
					Create New Account	Modify Existing Account	Transition Information Portal	Network Inventory	Network Billing
Agency Authorizing Official (check all that apply for you)									
<input checked="" type="checkbox"/> Agency Transition Manager					<input checked="" type="checkbox"/> Agency DAR Administrator				
Demo	Adara	demo.adara@agency.gov	123-555-5000	TEST Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/>	TE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I approve the following users for system access:									
Test	User	test.user@agency.gov	123-555-6000	TEST Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/>	TE01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	TE03	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	TE06ABCD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
New	Account	new.account@agency.gov	123-555-7000	TEST Sub-Agency	<input checked="" type="checkbox"/>	<input type="checkbox"/>	TE01ABCDXXXX12340000XXXX0000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	TE01EFGHXXXX12340000XXXX0000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Downloadable form accessed through link on Register Now page or Contact Us page.
- Agency DAR Administrator emails the completed form to the FAS Billing Help Desk ([fasbilling.help@gsa.gov](mailto:fasbilling.help@gsa.gov)).
- GSA creates the requested accounts.
- Each user gets a system email with User ID and password, once GSA has created the account.


### Agency Hierarchy Codes

- Identify requested level of data access
- You must enter at least two characters
- You may enter up to 28 characters
- The more characters you enter, the more a user's access is restricted, e.g..
  - If you enter TE, user will get all AHCs starting with TE
  - If you enter TE00000000000000000000000000000000, user will get only that AHC.
- You may enter multiple AHCs



## Federal Acquisition Service

# Navigation and Account Set-up

**E-MORRIS**  
Enhanced Monthly On-line Records and Reports  
of Information-Technology Services

Welcome Demo Adara | [My Account](#) | [Logout](#)

[Home](#) | [Inventory](#) | [Billing Reports](#) | [Manage Users](#)

[Home](#) | [User Guide](#) | [FAQ](#) | [News](#) | [Contact Us](#)

[Home](#) > [My Account](#)

**Tasks**

- [Change Password](#)
- [Change My Notifications](#)
- [Change My Preferences](#)

### My Account

**User Name** DEMO.ADARA@AGENCY.GOV

**First Name**

**Last Name**

**Address**

**City**

**State**

**Zip**

**Email Address**

**Telephone**

[Save Changes](#) [Reset](#)

- Must change password and accept Rules of Behavior on initial log-in
- Standard web site navigation
  - Tabs across top for modules
  - Links (sub-tabs) underneath for pages within modules
- Click on My Account link in top right corner to:
  - Update POC info - optional
  - Change Password - required every 90 days
  - Change system notifications - optional
  - **Change navigation preferences – optional unless you have more than 500 Agency Hierarchy Codes (see slides 28-31 for more info)**



## Federal Acquisition Service

# Navigation and Set-up (continued)

## My Account task screens

**My Notifications**

Notify me when these events occur

**for Agency Billing**  
Agency Reports Available for Month  
☒ Yes

**for Manage Users**  
Notify Me When a Registration is Received  
☒ Yes

Save Cancel

Home &gt; My Account

**Tasks**

- Change Password
- Change My Notifications
- Change My Preferences

- Options available for all users
- If you are an Agency DAR Administrator/ Account Manager, you can set these options for your users (see slide 41), as well as yourself
- However, users can change the settings through their own accounts.

- Change notifications – options for getting system emails
  - Billing reports available
  - Registration request received (option for DAR Admin account only)

**My Preferences**

**Common Elements**

Download File Format: Tab Delimited

Alternative Start Page: Billing Reports

Rows per Page: 30

Include Column Headers in Download File: Yes

**Agency Billing**

Default Report: Service Summary

AHC Selector Type: Popup List Drilldown (w/ filters)

Save Cancel

- Change web site preferences – options for changing navigation defaults
  - **Download format – recommend tab delimited (TSV)\***
  - Alternative start page after log-in – default is Home
  - Rows per page – default is 30
  - Include column headers – default is yes
  - Default report when first clicking on billing tab – default is MSOA
  - AHC selector type – default is dropdown
- **Changing these settings is optional, with the exception of AHC Selector Type IF you have more than 500 AHCs (see slides 28 – 31)**

\*Note: Default download format is comma delimited (CSV), but there is an issue in which Excel translates AHCs to scientific notation. TSV format negates the issue. If you don't set the default here, you can choose TSV format for any report by clicking on the down arrow next to the Download icon and selecting tab delimited.





## Federal Acquisition Service

# Networx Inventory Management (NIM)

## browse screens – active, history and shared tenant

Home Inventory **Billing Reports**

Browse Inventory Browse Inventory History NIM Active Errors NIM History Errors Shared Tenant

Home > Network Inventory

### Browse Inventory

Contract  Contractor  AHC Starts With...   
Service  or UBI

Advanced Search Options:

Originating NIC  Service Order No   
CLIN  ASRN

Customize Query Printer Friendly Download Download Phone No Range Custom Custom Phone No Range

VIEW	CONTRACT	CONTRACTOR	ORIGINATING NIC	ASRN	AHC	UBI	SERVICE	CLIN	SERVICE ORDER NO	UNIT PRICE
<a href="#">View</a>	Universal	Vendor1	TE08ONIC001	TESTASRNTE08	TE08000000000000000000000000000000	TESTUBITE08	VS	0019003	TESTSON008	.1
<a href="#">View</a>	Universal	Vendor1	TE09ONIC001	TESTASRNTE09	TE09000000000000000000000000000000	TESTUBITE09	TFS	0034002	TESTSON009	.01
<a href="#">View</a>	Universal	Vendor1	FTGMMDAAU87	TESTASRNTE08	TE08000000000000000000000000000000	TESTUBITE08	FLS	0760311	38931-1	16.05
<a href="#">View</a>	Universal	Vendor1	CLMAMD06U87	TESTASRNTE08	TE08000000000000000000000000000000	TESTUBITE08	FLS	0760311	38931-1	136.96
<a href="#">View</a>	Universal	Vendor1	FTGMMDAAU87	TESTASRNTE08	TE08000000000000000000000000000000	TESTUBITE08	PLS	0760111	38931-1	321
<a href="#">View</a>	Universal	Vendor1	FTGMMDAAU87	TESTASRNTE08	TE08000000000000000000000000000000	TESTUBITE08	PLS	0130509	38931-1	174.95
<a href="#">View</a>	Universal	Vendor1	CLMAMD06U87	TESTASRNTE08	TE08000000000000000000000000000000	TESTUBITE08	FLS	0760111	38931-1	321
<a href="#">View</a>	Universal	Vendor1	TE06ONIC001	TESTASRNTE06	TE06000000000000000000000000000000	TESTUBITE06	MNS	0280351	TESTSON006	74.9
<a href="#">View</a>	Universal	Vendor1	TE09ONIC001	TESTASRNTE09	TE09000000000000000000000000000000	TESTUBITE09	ACS	0269009	TESTSON009	0
<a href="#">View</a>	Universal	Vendor1	TE09ONIC001	TESTASRNTE09	TE09000000000000000000000000000000	TESTUBITE09	ACS	0269002	TESTSON009	0

- Populated from vendor SOCN files
- Query by AHC or UBI. Additional filters optional.
- Click on View to see details.
- Add report fields via customized query icon.
- Select, filter, sort on any field via Custom icon (see slides 32-36).
- Download contains all Gov't-requested J.12.2-4 (SOCN) fields.
- View inventory history via the Browse Inventory History link
- View shared tenant inventory for GSA consolidated switches via the Shared Tenant link



## Federal Acquisition Service

# NIM error reports – active and history

**GSA E-MORRIS**  
Enhanced Monthly On-line Records and Reports  
of Information-Technology Services

Welcome Emorris User | My Account | Logout

[Home](#) [Inventory](#) [Billing Reports](#)

[Browse Inventory](#) [Browse Inventory History](#) [NIM Active Errors](#) [NIM History Errors](#)

Home > Network Inventory > Daily SOCN Error Report

### NIM Active Errors

AHC Starts With...  Load Date:  -All Dates-  Contract:  All  Contractor:  All

Vendor	Contract ID	UBI	Nim ID	Load Date	Error Code	DAR	Orig NIC	Term NIC	ASRN	Orig Jurisdiction	Term Jurisdiction	Receipt Date	AHC
1	1	TESTUBITE09	0269002TE09ONIC001	09-MAY-2008 05:15:03 PM	X	TESTDARTE09	TE09ONIC001	-	TESTASRNTE09	120033	-	28-FEB-08	TE090000000
1	1	TESTUBITE09	0034002TE09ONIC001	09-MAY-2008 05:15:03 PM	130	TESTDARTE09	TE09ONIC001	-	TESTASRNTE09	120033	-	04-FEB-08	TE090000000
1	1	TESTUBITE09	0269009TE09ONIC001	09-MAY-2008 05:15:03 PM	X	TESTDARTE09	TE09ONIC001	-	TESTASRNTE09	120033	-	28-FEB-08	TE090000000
2	1	TESTUBITE04	0921144CLEXOH95U28	07-APR-2008 09:05:47 AM	18	TESTDARTE04	CLEXOH95U28	-	TESTASRNTE04	120033	-	23-JUL-06	TE040000000
2	1	TESTUBITE04	0639017CLEXOH95U28	07-APR-2008 09:05:47 AM	18	TESTDARTE04	CLEXOH95U28	-	TESTASRNTE04	120033	-	23-JUL-06	TE040000000
2	1	TESTUBITE05	0094008ABLNTX03MA2	31-MAR-2008 11:52:47 AM	18	TESTDARTE05	ABLNTX03MA2	-	TESTASRNTE05	120033	-	01-OCT-06	TE050000000
2	1	TESTUBITE05	0099013ABLNTX03MA2	31-MAR-2008 11:52:47 AM	18	TESTDARTE05	ABLNTX03MA2	-	TESTASRNTE05	120033	-	01-OCT-06	TE050000000
2	1	TESTUBITE05	0099004ABLNTX03MA2	31-MAR-2008 11:52:47 AM	18	TESTDARTE05	ABLNTX03MA2	-	TESTASRNTE05	120033	-	01-OCT-06	TE050000000
2	1	TESTUBITE05	0099011ABLNTX03MA2	31-MAR-2008 11:52:47 AM	130, m20, 18	TESTDARTE05	ABLNTX03MA2	-	TESTASRNTE05	120033	-	01-OCT-06	TE050000000
2	1	TESTUBITE05	0099011ABLNTX03MA2	31-MAR-2008 11:52:47 AM	20	TESTDARTE05	ABLNTX03MA2	-	TESTASRNTE05	120033	-	01-OCT-06	TE050000000
2	1	TESTUBITE04	0921244CLEXOH95U28	07-APR-2008 09:05:47 AM	18	TESTDARTE04	CLEXOH95U28	-	TESTASRNTE04	120033	-	23-JUL-06	TE040000000
2	1	TESTUBITE04	0921344CLEXOH95U28	07-APR-2008 09:05:47 AM	18	TESTDARTE04	CLEXOH95U28	-	TESTASRNTE04	120033	-	23-JUL-06	TE040000000
2	1	TESTUBITE04	0630006CLEXOH95U28	05-APR-2008 10:52:04 AM	18	TESTDARTE04	CLEXOH95U28	-	TESTASRNTE04	120033	-	23-JUL-06	TE040000000
2	1	TESTUBITE05	0094003ABLNTX03MA2	31-MAR-2008 11:52:47 AM	18	TESTDARTE05	ABLNTX03MA2	-	TESTASRNTE05	120033	-	01-OCT-06	TE050000000

1 - 14

- Report of SOCN errors found and reported to vendor.
- Active errors link shows open errors. History errors link shows corrected errors.
- Shows all NIM fields, plus error descriptions.
- Select, filter, sort on any field via Custom icon (see slides 32-36).
- Vendor errors can only be corrected by a new SOCN from the vendor – GSA does not change vendor SOCN data.

## Federal Acquisition Service

# Billing Reports

- Billing Summary – total charges by vendor and contract
  - MSOA – charges by Networx service type and category
  - Service Summary – charges by Networx service
  - Call Detail Summary – usage charges by phone/card number
  - CLIN Detail – charges by CLIN
  - Conferencing Services – charges for audio, video and web conferencing services
  - Vendor Adjustments – detail of vendor adjustments
  - GSA Adjustments – detail of GSA adjustments (central only)
  - Charges by Service – total charges by AHC and service (download only)
  - UBI Summary – charges by vendor Unique Billing Identifier
  - GSA Disputes – detail of disputes filed by GSA on behalf of Agencies (central only)
  - Vendor Disputes – detail of disputes as provided by vendors
  - Update LOA – reference list of central billed, billing level AHCs with BOAC and LOA
- 
- All reports apply to central and direct billing, unless noted above.
  - All reports have printer friendly and download options, unless noted above.
  - Data layouts are available with the download files, and in the billing report user guide.

## Federal Acquisition Service

# MSOA / Reports Availability

- E-MORRIS “bill period” is the usage month
- The vendor invoice is delivered by the 15<sup>th</sup> business day of the following month (approx. the 21<sup>st</sup> or 22<sup>nd</sup>)
- E-MORRIS billing reports are available 2 months after the usage month (between the 10<sup>th</sup> – 15<sup>th</sup> calendar day)
- For example:

Select Report Criteria

Bill Period	Jan 2008	Vendor	Vendor2	Contract	Universal	AHC	.TE01
Break On	Vendor	Central/Direct	Central				

Usage	Vendor Invoice	E-MORRIS Reports	IPAC / Bill (central)
Jan 1 – 31	dated Feb 2008, delivered by Feb 21 or 22	dated Jan 2008, posted between Mar 10 - 15	dated Jan 2008, billed between Mar 22 – 28



# Federal Acquisition Service

# Billing Summary Report



Welcome Emorris User | [My Account](#) | [Logout](#)

The screenshot displays the 'Billing Reports' page. On the left is a navigation tree with categories like 'All Billing Reports', 'Service Summary Reports', 'Detail Reports', 'Summary Reports', and 'Dispute Reports'. The 'Summary' report under 'All Billing Reports' is selected. At the top, there's a 'Select Report Criteria' section with a dropdown menu showing 'AHC' and a value 'TE01 0000 0000 0000 0000 0000 0000 - Bill'. Below this is a 'Central/Direct' dropdown set to 'Central'. To the right of the selection area are links for 'Hide Selection Box', 'Printer Friendly', 'Download', 'User Guide', and 'Custom'. The main content area is titled 'Network Billing Summary By Month'. It displays 'Agency Hierarchy Code: TE01000000000000000000000000000000', 'Agency Name: Agency E01EFG', 'Line of Accounting:', 'Bill to AHC: TE01000000000000000000000000000000', 'BOAC: TEST01', and 'Central/Direct: Central'. Below this is a table for 'January 2008' with columns for 'Vendor', 'Total', 'Universal', and 'Enterprise'. The table shows data for 'Vendor2' and a 'Total' row.

January 2008			
Vendor	Total	Universal	Enterprise
Vendor2	409,729.73	203,736.33	205,993.40
Total	409,729.73	203,736.33	205,993.40

There are multiple ways to navigate through the billing reports:

- Report list to the left of the page (you can hide or show this list)
- Links across the top under the Billing Reports tab

- Highest level summary of charges by Networkx vendor and contract
- Query by AHC and Central/Direct
- Link from amounts to corresponding MSOA

There are multiple ways to navigate through the billing reports:

- Report list to the left of the page (you can hide or show this list as you choose)
- Links across the top under the Billing Reports tab
- Links from within summary reports to lower level reports



## Federal Acquisition Service

# Monthly Statement of Account (MSOA)

Select Report Criteria

Bill Period: Jan 2008 Vendor: Vendor2 Contract: Universal AHC: TE01 0000 0000 0000 0000 0000 - Bill

Break On: Vendor Central/Direct Central

Go

Hide Selection Box Printer Friendly Download User Guide Custom

GSA

THIS IS NOT A BILL - DO NOT PAY

Networx

Monthly Statement of Account

January 2008

Billing Level

Vendor 2

Contract: Universal

Vendor: Vendor2

Agency Hierarchy Code: TE01000000000000000000000000000000

Line of Accounting:

Bill to AHC: TE01000000000000000000000000000000

Agency Name: Agency E01EFG

BOAC: TEST01

Central/Direct: Central

Networkx Services	Network Contractor Charges								GSA Adjustments	Total Networkx Charges	
	Usage Volume	Usage Amount	Monthly Recurring	Non Recurring	Taxes & Surcharges	USF	PICC	Vendor Adjustments			
Telecommunications Services	0.0	254.82	2,551.72	8,041.05	216.99	330.15	0.00	(5.00)	11,389.73	(1,050.82)	9,738.91
Communications Transport Services	0.0	268.27	198.36	0.00	0.45	0.27	0.00	(410.25)	57.10	(191.00)	(133.90)
IP Based Services	0.0	0.00	155,074.50	0.00	0.00	0.00	0.00	0.00	155,074.50	0.00	155,074.50
Optical Services	0.0	523.09	157,824.58	8,041.05	217.44	330.42	0.00	(415.25)	166,521.33	(1,841.82)	164,679.51
Subtotal Telecommunications Services	0.0	523.09	157,824.58	8,041.05	217.44	330.42	0.00	(415.25)	166,521.33	(1,841.82)	164,679.51
Management and Application Services	240.0	1,213.49	1,576.53	8,121.30	399.22	0.00	0.00	0.00	11,310.54	0.00	11,310.54
Security Services	0.0	0.00	10,684.13	14,150.00	600.00	0.00	0.00	0.00	25,434.13	0.00	25,434.13
Special Services	0.0	0.00	0.00	2,140.00	0.00	0.00	0.00	0.00	2,140.00	0.00	2,140.00
Wireless Services	0.0	0.00	168.17	0.00	3.98	0.00	0.00	0.00	172.15	0.00	172.15
Access Services	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Miscellaneous	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Federal Relay Service	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Charges	240.0	1,736.58	170,253.41	32,452.35	1,220.64	330.42	0.00	(415.25)	205,578.15	(1,841.82)	203,736.33

For questions concerning this report, please contact the FAS Billing Help Desk at 1-877-944-8677 or fasbilling.help@gsa.gov.

THIS IS NOT A BILL DO NOT PAY

- High level summary of charges at Service Type/ Category level
- Query by Bill Period, Vendor, Contract, AHC and Central/Direct
- Link from the Networkx Services column to the corresponding Service Summary report

## Federal Acquisition Service

# Service Summary report


Select Report Criteria

Bill Period: Jan 2008 Vendor: Vendor2 Contract: Universal AHC: TE01 0000 0000 0000 0000 0000 - Bill

Break On: Vendor Service Type: Communications Transport Services Central/Direct: Central

Go

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<div>  <div> <b>Network</b>            Summary By Service            January 2008            Communications Transport Services            Billing Level         </div> <div>Vendor 2</div> </div>										
Contract: Universal Vendor: Vendor2 Agency Hierarchy Code: TE01000000000000000000000000000000 Line of Accounting:					Bill to AHC: TE01000000000000000000000000000000 Agency Name: Agency E01EFG BOAC: TEST01 Central/Direct: Central					
Service	Usage Volume	Usage Amount	Monthly Recurring	Non-Recurring	Taxes & Surcharges	USF	PICC	Vendor Adjustments	GSA Adjustments	Total Network Charges
Asynchronous Transfer Mode	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Circuit Switched Data	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Combined (local and Long distance)	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ethernet	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Frame Relay	0.0	0.00	905.94	0.00	10.58	48.69	0.00	0.00	(481.98)	483.25
Private Line	0.0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<a href="#">Toll-Free</a>	<a href="#">0.0</a>	<a href="#">213.03</a>	1,291.28	8,041.05	204.62	278.98	0.00	(5.00)	(1,188.58)	8,855.40
<a href="#">Voice</a>	<a href="#">0.0</a>	<a href="#">41.79</a>	354.50	0.00	1.79	4.48	0.00	0.00	(2.30)	400.26
<b>Total</b>	<b>0.0</b>	<b>254.82</b>	<b>2,551.72</b>	<b>8,041.05</b>	<b>216.99</b>	<b>330.15</b>	<b>0.00</b>	<b>(5.00)</b>	<b>(1,650.82)</b>	<b>9,738.91</b>

- High level summary of charges at Service level
- Query by Bill Period, Vendor, Contract, AHC, Service Type and Central/Direct
- Link from Service column to corresponding CLIN Detail report, Usage Volume/ Amount columns to corresponding Call Detail Summary report, Vendor Adjust column to Vendor Adjust report, and GSA Adjust column to GSA Adjust report





## Federal Acquisition Service

# Call Detail Summary report

Select Report Criteria

Bill Period: Jan 2008 Vendor: Vendor2 Contract: Universal AHC: TE01 0000 0000 0000 0000 0000 - Bill

Service: -All- Central/Direct: Central

Go

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Network

Call Detail Service Summary

January 2008

Billing Level

Contract: Universal

Vendor: Vendor2

Agency Hierarchy Code: TE01000000000000000000000000000000

Line of Accounting:

Bill to AHC: TE01000000000000000000000000000000

Agency Name: Agency E01EFG

BOAC: TEST01

Central/Direct: Central

Contract	Vendor	AHC	Service	UBI	ASRN	Contractor CustAcct#	NIC	SWC	Phone/Card Number	Alloc %	Dom Int	C/D	Calls	Minutes	Average Minutes/Call	Usage	Average Cost/Minute	Average Cost/Call	
Universal	Vendor2	TE01ABCD00000000000000000000000000	Audio Conferencing	UBIACTE01AB	TESTASRNTE01	TESTCCANTE01	TESTNIC1234		5551111231	100	D	C	0	0.00	0.00	0.00	0.00	0.00	
			Cellular/PCS	UBICPTE01AB	TESTASRNTE01	TESTCCANTE01	TESTNIC1234		5551111212	100	D	C	0	0.00	0.00	0.00	0.00	0.00	
			Outbound	UBIVCTE01AB	TESTASRNTE01	TESTCCANTE01	TESTNIC1234		5551111212	100	D	C	3	1,661.40	553.80	14.93	0.01	4.98	
			Toll-Free	UBITFTE01AB	TESTASRNTE01	TESTCCANTE01	TESTNIC1234		8881111231	100	D	C	45	18,899.30	419.98	213.03	0.01	4.73	
			Voice over IP Transport	UBIVITE01AB	TESTASRNTE01	TESTCCANTE01	ELSGCA01DB5		5551111212	100	D	C	16	17,908.60	1,119.29	268.27	0.01	16.77	
Total TE01ABCD00000000000000000000000000														64	38,469.30	601.08	496.23	0.01	7.75
		TE01EFGH00000000000000000000000000	Audio Conferencing	UBIACTE01EF	TESTASRNTE01	TESTCCANTE01	ELZBNJ09CT1		5552221231	100	D	C	2	47,400.00	23,700.00	1,213.49	0.03	606.75	
			Cellular/PCS	UBICPTE01EF	TESTASRNTE01	TESTCCANTE01	TESTNIC1234		5552221221	100	D	C	0	0.00	0.00	0.00	0.00	0.00	
			Outbound	UBIVCTE01EF	TESTASRNTE01	TESTCCANTE01	TESTNIC1234		5552221221	100	D	C	3	2,988.00	996.00	26.86	0.01	8.95	
			Toll-Free	UBITFTE01EF	TESTASRNTE01	TESTCCANTE01	TESTNIC1234		8882221231	100	D	C	0	0.00	0.00	0.00	0.00	0.00	
			Voice over IP Transport	UBIVITE01EF	TESTASRNTE01	TESTCCANTE01	TESTNIC1234		5552221221	100	D	C	0	0.00	0.00	0.00	0.00	0.00	
Total TE01EFGH00000000000000000000000000														5	50,388.00	10,077.60	1,240.35	0.02	248.07
Total Universal Vendor2														69	88,857.30	1,287.79	1,736.58	0.02	25.17
Grand Total														69	88,857.30	1,287.79	1,736.58	0.02	25.17

Summary of usage charges by phone/ card number

Query by Bill Period, Vendor, Contract, AHC, Service and Central/ Direct



## Federal Acquisition Service

# CLIN Detail Report

Select Report Criteria

Bill Period: Jan 2008 Vendor: Vendor2 Contract: Universal AHC: .TE01 0000 0000 0000 0000 0000 - Bill

Service: Frame Relay Central/Direct: Central

Go

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GSA

Network

CLIN Detail

January 2008

Billing Level

GSA

Contract: Universal

Vendor: Vendor2

Agency Hierarchy Code: TE01000000000000000000000000000000

Line of Accounting:

Bill to AHC: TE01000000000000000000000000000000

Agency Name: Agency E01EFG

BOAC: TEST01

Central/Direct: Central

Service	Svc Order	UBI	ASRN	CLIN	Qty	Dom Int	C/D	Orig NIC	Term NIC	Billing Period	Install Date	Disconn Date	Usage	MRC	NRC	Tax Surcharge	USF	PICC	Total Charge
Universal Contract																			
Vendor Vendor2																			
TE01ABCD00000000000000000000000000																			
FRS	2825098	UBIFRTE01AB	TESTASRNT01	0000000	2	D	C	WHTMMO05UAR		01/20/08-01/31/08	01/20/08		\$0.00	\$0.00	\$0.00	\$0.00	\$48.69	\$0.00	\$48.69
FRS	2825098	UBIFRTE01AB	TESTASRNT01	0044404	2	D	C	WHTMMO05UAR		01/20/08-01/31/08	01/20/08		\$0.00	\$452.97	\$0.00	\$0.00	\$0.00	\$0.00	\$452.97
Subtotal for Service FRS													\$0.00	\$452.97	\$0.00	\$0.00	\$48.69	\$0.00	\$501.66
Subtotal for TE01ABCD00000000000000000000000000													\$0.00	\$452.97	\$0.00	\$0.00	\$48.69	\$0.00	\$501.66
TE01EFGH00000000000000000000000000																			
FRS	2825098	UBIFRTE01AB	TESTASRNT01	0000000	2	D	C	WHTMMO05UAR		01/20/08-01/31/08	01/20/08		\$0.00	\$0.00	\$0.00	\$10.58	\$0.00	\$0.00	\$10.58
FRS	2825098	UBIFRTE01AB	TESTASRNT01	0044404	2	D	C	WHTMMO05UAR		01/20/08-01/31/08	01/20/08		\$0.00	\$452.97	\$0.00	\$0.00	\$0.00	\$0.00	\$452.97
Subtotal for Service FRS													\$0.00	\$452.97	\$0.00	\$10.58	\$0.00	\$0.00	\$463.55
Subtotal for TE01EFGH00000000000000000000000000													\$0.00	\$452.97	\$0.00	\$10.58	\$0.00	\$0.00	\$463.55
Subtotal for Vendor Vendor2													\$0.00	\$905.94	\$0.00	\$10.58	\$48.69	\$0.00	\$965.21
Subtotal for Universal Contract													\$0.00	\$905.94	\$0.00	\$10.58	\$48.69	\$0.00	\$965.21
Total Charges													\$0.00	\$905.94	\$0.00	\$10.58	\$48.69	\$0.00	\$965.21

- Detail of charges by CLIN. Lowest level of data available in E-MORRIS.
- Query by Bill Period, Vendor, Contract, AHC, Service and Central/Direct
- Download includes all Gov't-requested fields from J.12.4.2 (Detail Billing File)
- Does not include call detail usage



# Federal Acquisition Service

# Conferencing Services report

Select Report Criteria

Bill Period	<input type="text" value="Jan 2008"/>	Vendor	<input type="text" value="Vendor2"/>	Contract	<input type="text" value="Universal"/>	AHC	<input type="text" value="..TE01 0000 0000 0000 0000 0000 - Bill"/>	<input type="button" value="Go"/>
Service	<input type="text" value="-All-"/>	Central/Direct	<input type="text" value="Central"/>					

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  User Guide
  Custom

GSA

Network

Conferencing Services

January 2008

Billing Level

GSA

Contract: Universal

Vendor: Vendor2

Agency Hierarchy Code: TE01000000000000000000000000000000

Line of Accounting:

Bill to AHC: TE01000000000000000000000000000000

Agency Name: Agency E01EFG

BOAC: TEST01

Central/Direct: Central

AHC	C/D	Service	UBI	ASRN	CLIN	CLIN Description	Calling Card Number	Orig Phone	Term Phone	Conference ID	Date	Time	Duration	Call Duration	Quantity	MRC	NRC	Usage Charges	Tax	USF	Total Charge
Universal Contract																					
Vendor Vendor2																					
TE01ABCD0000000000000000000000000000	C	Audio	UBIACTE01AB	TESTASRNT01	TESTCLIN	TEST Description	5551111231			1 5551111231	10/05/07	00:00		0	0	0.00	0.00	0.00	200.02	0.00	200.02
TE01ABCD0000000000000000000000000000	C	Audio	UBIACTE01AB	TESTASRNT01	TESTCLIN	TEST Description	5551111231			1 5551111231	10/05/07	00:00		0	0	0.00	0.00	0.00	199.00	0.00	199.00
TE01EFGH0000000000000000000000000000	C	Audio	UBIACTE01AB	TESTASRNT01	TESTCLIN	TEST Description	5552221231			1 5552221231	10/05/07	00:00		0	0	0.00	0.00	606.74	0.00	0.00	606.74
TE01EFGH0000000000000000000000000000	C	Audio	UBIACTE01AB	TESTASRNT01	TESTCLIN	TEST Description	5552221231			1 5552221231	10/05/07	00:00		0	0	0.00	0.00	606.75	0.00	0.00	606.75
Subtotal for Vendor: Vendor2																0.00	0.00	1,213.49	399.02	0.00	1,612.51
Subtotal for Contract: Universal																0.00	0.00	1,213.49	399.02	0.00	1,612.51
Total Charges																0.00	0.00	1,213.49	399.02	0.00	1,612.51

row(s) 1 - 9 of 9

- o Detail of usage & non-usage charges for Audio, Video and Web conferencing services
- o Query by Bill Period, Vendor, Contract, AHC, Service and Central/Direct
- o Usage charges also found in Call Detail Summary
- o Non usage charges also found in CLIN Detail



## Federal Acquisition Service

# Vendor Adjustments report


Select Report Criteria

Bill Period: Jan 2008 Vendor: Vendor2 Contract: Universal AHC: TE01 0000 0000 0000 0000 0000 - Bill

Service: -All- Central/Direct: Central

Go

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Network

Vendor Adjustments

January 2008

Billing Level



Contract: Universal

Vendor: Vendor2

Agency Hierarchy Code: TE01000000000000000000000000000000

Line of Accounting:

Bill to AHC: TE01000000000000000000000000000000

Agency Name: Agency E01EFG

BOAC: TEST01

Central/Direct: Central

AHC	Vendor Disp No	Gov Disp No	Invoice Date	Svc	UBI	ASRN	Orig NIC	Term NIC	CLIN	C/D	Svc Adj	Tax Adj	USF Adj	PICC Adj	Total Adj	Explanation
Universal Contract																
Vendor Vendor2																
TE01ABCD00000000000000000000000000		GOVDISP0001	12/12/07	TFS	UBITFTE01AB					C	-\$5.00	\$0.00	\$0.00	\$0.00	-\$5.00	Explanation of adjustment
TE01ABCD00000000000000000000000000		GOVDISP0002	12/12/07	VOIPTS	UBIVITE01AB					C	-\$410.25	\$0.00	\$0.00	\$0.00	-\$410.25	Explanation of adjustment
Subtotal for TE01ABCD00000000000000000000000000											-\$415.25	\$0.00	\$0.00	\$0.00	-\$415.25	
Subtotal for Vendor Vendor2											-\$415.25	\$0.00	\$0.00	\$0.00	-\$415.25	
Subtotal for Universal Contract											-\$415.25	\$0.00	\$0.00	\$0.00	-\$415.25	
Total Adjustments											-\$415.25	\$0.00	\$0.00	\$0.00	-\$415.25	

- Detail of vendor adjustments
- Query by Bill Period, Vendor, Contract, AHC, Service and Central/Direct
- Download has additional fields:
  - Invoice Number
  - Charged Amount
  - Disputed Amount
  - Bill Start
  - Bill End



## Federal Acquisition Service

# GSA Adjustments report

Select Report Criteria

Bill Period: Jan 2008 Vendor: -All- Contract: -All- AHC: .TE01 0000 0000 0000 0000 0000 0000 - Bill Service: -All-

Go

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- Detail of GSA adjustments (for centralized billing)
- Query by Bill Period, Vendor, Contract, AHC and Service

GSA

Networkx

GSA Adjustments

January 2008

Billing Level

GSA

Contract: Universal

Vendor: Vendor2

Agency Hierarchy Code: TE01000000000000000000000000000000

Service:

Line of Accounting:

Bill to AHC: TE01000000000000000000000000000000

Agency Name: Agency E01EFG

BOAC: TEST01

Contract	Vendor	AHC	Phone Number	Circuit ID	UBI	ASRN	Orig Bill Date	Adjustment Reason	Service	NIC	Acct No	Calls	Minutes	System ID	Customer ID	Total Lines	Agency Lines	Allocation	Svc Adj	Tax Adj	USF Adj	PICC Adj	Total Adj
Universal	Vendor2	TE01ABCD00000000000000000000000000	1235551234	TESTCIRCUITIDTE01	UBIACTE01AB	TESTASRNTED01P-QPS	01-JAN-08	TCR:PICTTYC99999999999999999999	Voice	MOB									(2.30)	0.00	0.00	0.00	(2.30)
Universal	Vendor2	TE01ABCD00000000000000000000000000			UBIACTE01AB		01-JAN-08	TCR:NRCTTTF99999999999999999999	Toll-Free	PR									(1,050.05)	(59.51)	0.00	0.00	(1,155.56)
Universal	Vendor2	TE01ABCD00000000000000000000000000					01-JAN-08	Reason for adjustment	Voice over IP Transport										(95.00)	(95.00)	0.00	0.00	(191.00)
Universal	Vendor2	TE01ABCD00000000000000000000000000					01-JAN-08	Reason for adjustment	Toll-Free										(5.00)	(5.00)	0.00	0.00	(11.00)
Universal	Vendor2	TE01ABCD00000000000000000000000000			UBIACTE01AB	TESTASRNTED01P-QPS	01-JAN-08	TCR:MRCTTFR99999999999999999999	Frame Relay	WHT									(452.97)	(28.99)	0.00	0.00	(481.96)
Subtotal TE01ABCD00000000000000000000000000																			(1,641.32)	(200.50)	0.00	0.00	(1,841.82)
Subtotal Universal/Vendor2																			(1,641.32)	(200.50)	0.00	0.00	(1,841.82)
Total																			(1,641.32)	(200.50)	0.00	0.00	(1,841.82)

- Includes shared tenant rebill adjustments for service behind GSA consolidated switches
- Includes transition credits (identified by TCR in adjustment reason)\*

\*Note: Transition Credit reports for Direct Bill will be on the Transition Information Portal (TIP) web site, along with additional Central Billed transition credit reports.



## Federal Acquisition Service

# Charges by Service report

Select Report Criteria

Bill Period: Jan 2008 Vendor: Vendor2 Contract: Universal AHC: .TE01 0000 0000 0000 0000 0000 0000 - Bill

Central/Direct: Central

Go

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GSA

Contract: Universal

Vendor: Vendor2

Agency Hierarchy Code: TE01000000000000000000000000000000

Line of Accounting:

Ahc 🏠	Vs	Csds	Tfs	Cs	Pls	Frs	Atms	Eths	CommSub	Pbip- Vpns	Nbip- Vpns	VoipTs	Cdns	Cips	Iptels	Ips	L2Vpns	IpVts	IpSub	Sonets	Ows	Dfs	OpSub	Vts	Mn
TE01ABCD00000000000000000000000000	116.01	0.00	8,283.35	0.00	0.00	452.97	0.00	0.00	8,832.33	0.00	99.18	268.27	0.00	0.00	0.00	0.00	0.00	0.00	387.45	3498.54	0.00	0.00	3498.54	0.00	0.00
TE01EFGH00000000000000000000000000	282.07	0.00	1,486.83	0.00	0.00	483.55	0.00	0.00	2,232.25	0.00	99.18	0.45	0.00	0.00	0.00	0.00	0.00	0.00	99.63	151575.96	0.00	0.00	151575.96	0.00	0.00

1 - 2

- Total charges by AHC and service
- Partial screen shot – report includes additional fields for each service and subtotals by service type/ category
- Query by Bill Period, Contract, Vendor, AHC and Central/Direct
- Download only – no print option



## Federal Acquisition Service

# UBI Summary report

Select Report Criteria

Bill Period: Jan 2008 Vendor: Vendor2 Contract: Universal AHC: ...TE01 ABCD 0000 0000 0000 0000 - Detail Central Go

Service: -All- Central/Direct: Central

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Networkx UBI Summary January 2008 Detail Level												
Contract: Universal Vendor: Vendor2 Agency Hierarchy Code: TE01ABCD00000000000000000000 Service: Line of Accounting:				Bill to AHC: TE0100000000000000000000000000 Agency Name: Agency E01ABC BOAC: TEST01 Central/Direct: Central								
Contract	Vendor	AHC	Service	UBI	C/D	Usage	MRC	NRC	Tax/ Surchg	USF	PICC	Total Charge
Universal	Vendor2	TE01ABCD00000000000000000000	ACS	UBIACTE01AB	C	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Universal	Vendor2	TE01ABCD00000000000000000000	CPCS	UBICPTE01AB	C	0.00	163.09	0.00	0.00	0.00	0.00	163.09
Universal	Vendor2	TE01ABCD00000000000000000000	FRS	UBIFRTE01AB	C	0.00	452.97	0.00	0.00	48.69	0.00	501.66
Universal	Vendor2	TE01ABCD00000000000000000000	LMRS	UBILMTE01AB	C	0.00	0.00	1,070.00	0.00	0.00	0.00	1,070.00
Universal	Vendor2	TE01ABCD00000000000000000000	MFS	UBIMFTE01AB	C	0.00	0.00	10,700.00	0.00	0.00	0.00	10,700.00
Universal	Vendor2	TE01ABCD00000000000000000000	MTSS	UBIMTTE01AB	C	0.00	500.00	0.00	105.00	0.00	0.00	605.00
Universal	Vendor2	TE01ABCD00000000000000000000	NBIP-VPNS	UBINITE01AB	C	0.00	99.18	0.00	0.00	0.00	0.00	99.18
Universal	Vendor2	TE01ABCD00000000000000000000	SONETS	UBISOTE01AB	C	0.00	3,498.54	0.00	0.00	0.00	0.00	3,498.54
Universal	Vendor2	TE01ABCD00000000000000000000	TFS	UBITFTE01AB	C	0.00	0.00	8,041.05	0.00	0.00	0.00	8,041.05
Universal	Vendor2	TE01ABCD00000000000000000000	TWS	UBITWTE01AB	C	0.00	1,576.53	0.00	0.00	0.00	0.00	1,576.53
Universal	Vendor2	TE01ABCD00000000000000000000	VOIPTS	UBIVITE01AB	C	0.00	0.00	0.00	0.00	0.27	0.00	0.27
Universal	Vendor2	TE01ABCD00000000000000000000	VS	UBIVCTE01AB	C	0.00	100.43	0.00	0.00	0.00	0.00	100.43
Subtotal TE01ABCD00000000000000000000						0.00	6,390.74	19,811.05	105.00	48.96	0.00	26,355.75
Subtotal Universal/Vendor2						0.00	6,390.74	19,811.05	105.00	48.96	0.00	26,355.75
Total						0.00	6,390.74	19,811.05	105.00	48.96	0.00	26,355.75

- Summary of charges by vendor Unique Billing Identifier
- Query by Bill Period, Vendor, Contract, AHC, Service and Central/Direct





## Federal Acquisition Service

# GSA Disputes report


Select Report Criteria

Invoice Date  Vendor  Contract  AHC  Bill

Service  Status Code


Gov Disp No. Range - From  To

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Network

GSA Disputes



Contract: Universal

Vendor: Vendor2

Agency Hierarchy Code: TE01000000000000000000000000000000

Invoice Date: ALL

Line of Accounting:

Bill to AHC: TE01000000000000000000000000000000

Agency Name: Agency E01EFG

BOAC: TEST01

Vendor	Contract	Gov Dispute No	Status	Recorded Date	AHC	UBI	ASRN	Invoice Date	Service Type	Dispute Reason	Charged Amt	Disputed Amt	Outstanding Amt	Adjustments Received
Vendor2	Universal	GOVDISP0001	Closed Final Disputed <= \$15,000	12/20/07	TE01ABCD00000000000000000000000000	UBITFT01AB		12/12/07	Toll-Free	Duplicate billing charges	5.00	5.00	0.00	(5.00)
Vendor2	Universal	GOVDISP0002	Closed Final Disputed <= \$15,000	12/20/07	TE01ABCD00000000000000000000000000	UBIVITE01AB		12/12/07	Voice over IP Transport	Price not matched in Prior	760.10	410.25	0.00	(410.25)
Subtotal for Invoice Date 12-DEC-07											765.10	415.25	0.00	(415.25)
Total Charges											765.10	415.25	0.00	(415.25)

1 - 4

- Detail of disputes initiated by GSA on behalf of the Agency (for centralized billing)
- Query by Invoice Date, Vendor, Contract, AHC, Service and Status Code. Optional filter by Gov Dispute Number.
- Download includes additional fields.



## Federal Acquisition Service

# Vendor Disputes report

Select Report Criteria

Invoice Date:  Vendor:  Contract:  AHC:

Service:  Status Code:  Central/Direct:

Gov Disp No. Range - From:  To:

GSA

Network

Vendor Disputes

Invoice Date: ALL

Contract: Universal

Vendor: Vendor2

Agency Hierarchy Code: TE01000000000000000000000000000000

Line of Accounting:

Bill to AHC: TE01000000000000000000000000000000

Agency Name: Agency E01EFG

BOAC: TEST01

Central/Direct: Central

Contract

Vendor

Central/Direct

AHC

Govt Disp #

Vendor Disp #

Invoice Date

Account Number

Service

Circuit ID

UBI

ASRN

CLIN

Orig NIC

Term NIC

Disputed Amount

Dispute Status

Billing Period

Dispute Description

Universal

Vendor2

C

TE01ABCD00000000000000000000000000

GOVDISP0001

12345678

12/12/07

AcqABCD

Toll Free

UBITFT01AB

TestCln

5.00

Closed

01/01/08

Duplicate Calls

Universal

Vendor2

C

TE01ABCD00000000000000000000000000

GOVDISP0002

12345679

12/12/07

AcqABCD

Voice over IP Transport

UBIVITE01AB

TestCln

410.25

Closed

01/01/08

P-Price not matched in Pri

Subtotal for Invoice Date 12-DEC-07

415.25

Total Charges

415.25

1 - 4

- Detail of disputes as provided by vendor in J.12.5.1 Disputes file
- Query by Invoice Date, Vendor, Contract, AHC, Service, Status Code and Central/Direct. Optional filter by Gov Dispute Number.
- Download includes additional fields.



## Federal Acquisition Service

# Update LOA “report”

*All billing report users have view access*

AHC Starts With:  BOAC:

View	AHC	Agency Name	BOAC	Contract Name	Vendor Name	LOA	LOA DODACC
	TE 01000000000000000000000000000000	Test Agency TE01	TE0100	Universal			
	TE 03000000000000000000000000000000	Test Agency TE03	TE0321	Universal		THIS_CODE_IS_OPTIONAL_AND_AGENCY-DEFINED	
	TE 03000000000000000000000000000000	Test Agency TE03	TE0321	Enterprise		BRE AK OUT BY CONTRACT IF YOU WANT	
	TE 05000000000000000000000000000000	Test Agency TE05	TE0555	Universal	Vendor1	OR.BRE AK.OUT.BY.CONTRACT.AND.VENDOR	
	TE 05000000000000000000000000000000	Test Agency TE05	TE0555	Universal	Vendor2	WHATWOULD YOUTHINKIFISANGOUT OFTUNE	
	TE 05000000000000000000000000000000	Test Agency TE05	TE0555	Enterprise		TESTLOA83737373--upto130characters	

- List of centrally billed, billing level AHCs with associated Billed Office Address Code (BOAC) and Line of Accounting (LOA)

*Some users have edit access (as approved by DAR Admin)*

AHC Starts With:  BOAC:

Edit	AHC	Agency Name	BOAC	Contract Name	Vendor Name	LOA	LOA DODACC
	TE 01000000000000000000000000000000	Test Agency TE01	TE0100	Universal			
	TE 03000000000000000000000000000000	Test Agency TE03	TE0321	Universal		THIS_CODE_IS_OPTIONAL_AND_AGENCY-DEFINED	
	TE 03000000000000000000000000000000	Test Agency TE03	TE0321	Enterprise		BRE AK OUT BY CONTRACT IF YOU WANT	
	TE 05000000000000000000000000000000	Test Agency TE05	TE0555	Universal	Vendor1	OR.BRE AK.OUT.BY.CONTRACT.AND.VENDOR	
	TE 05000000000000000000000000000000	Test Agency TE05	TE0555	Universal	Vendor2	WHATWOULD YOUTHINKIFISANGOUT OFTUNE	
	TE 05000000000000000000000000000000	Test Agency TE05	TE0555	Enterprise		TESTLOA83737373--upto130characters	

- Query by AHC or BOAC
- Approved users can edit LOAs (see slide 26)

Line of Accounting (LOA) – an optional, Agency-defined field that appears on reports and IPAC / non-IPAC statements for central billing, and may be helpful for tracking and monitoring against an Agency’s approved budgetary resources.



## Federal Acquisition Service

# Update LOA edit forms

**Edit Existing Record**

AHC	TE 01000000000000000000000000000000
Agency Name	Test Agency TE01
BOAC	TE 0100
Contract Name	Universal
Vendor Name	
LOA	<input type="text"/>
DODACC	<input type="text"/>

Or

**Add New LOA For This AHC**

AHC	TE 01000000000000000000000000000000
Agency Name	Test Agency TE01
BOAC	TE 0100
* Contract Name	- Select One -
Vendor Name	- Select One -
LOA	<input type="text"/>
DODACC	<input type="text"/>

- LOA is optional and Agency-defined
- LOAs can be assigned:
  - Per AHC
  - Per AHC and contract (Universal or Enterprise)
  - Per AHC, contract and vendor
- To assign one LOA to an AHC, enter data in the Edit Existing Record form and click the Apply Changes button.
- To assign multiple LOAs to an AHC, enter data in the Add New LOA for this AHC form and click the Create button.
- Changes take effect with the next billing cycle.

Each centrally billed, billing level AHC has one BOAC and may have zero, one or more LOAs (no more than one LOA per AHC/contract/vendor combination). This form allows approved users to edit LOAs – not AHCs or BOACs.



## Federal Acquisition Service

# Break-on option and report tabs

Select Report Criteria

Bill Period  Vendor  Contract  AHC

Break On  Central/Direct

☐ Hide Selection Box ☐ Printer Friendly ☐ Download ☐ User Guide

Summary Vendor1 Vendor2

THIS IS NOT A BILL - DO NOT PAY

**Networkx**

Monthly Statement of Account

Year to Date 2008

Summary Level

Break On	Other Query Option	Result
Bill Period	Bill Period = YTD	Tabs by month
Contract	Contract = All	Tabs by contract
Vendor	Vendor = All	Tabs by vendor
Central/Direct	Central/Direct = All	Tabs by central/direct

- Use the Break On query options to break your report into separate tabs, depending on your other query selections.
- Applies to the MSOA and Service Summary reports.
- The Billing Summary will automatically show tabs by month.
- The printer friendly option will show all the tabbed reports.

## Federal Acquisition Service

# Report query AHC selector options

- 3 options for AHC selector, depending on how many AHCs you have
  - Dropdown list – fewer than 500 AHCs (system default)
  - Popup list with filters – between 500 and 2,000 AHCs
  - Popup list drilldown with filters – more than 2,000 AHCs

- How to change your default option
  1. Click the My Account link
  2. Click the Change My Preferences link.
  3. Click the down arrow next to AHC selector type and select an option.
  4. Click the save button.
  5. When you return to Billing Reports, you'll see the new AHC selector type.

**My Preferences**

<b>Common Elements</b>	
Download File Format	Tab Delimited ▼
Alternative Start Page	Billing Reports ▼
Rows per Page	30 ▼
Include Column Headers in Download File	Yes ▼
<b>Agency Billing</b>	
Default Report	Service Summary ▼
AHC Selector Type	Drop-down (for limited # of AHCs) ▼ None Drop-down (for limited # of AHCs) Popup List (w/ filters) Popup List Drilldown (w/ filters)

## Federal Acquisition Service

# Dropdown list (system default)

Select Report Criteria

Bill Period  Vendor  Contract  AHC

Break On  Central/Direct

-All-

-Begins With (Enter Start of AHC in Field at Right->)

TE\*\* 0000 0000 0000 0000 0000 0000 - Summary

...TE01 0000 0000 0000 0000 0000 0000 - Bill

...TE01 ABCD 0000 0000 0000 0000 0000 - Detail Central

...TE01 DEM3 0000 0000 0000 0000 0000 - Detail Direct

...TE01 EFGH 0000 0000 0000 0000 0000 - Detail Central

...TE01 MNOP 0000 0000 0000 0000 0000 - Detail Direct

...TE03 0000 0000 0000 0000 0000 0000 - Bill

...TE03 0000 0000 0000 0000 0000 0000 - Detail Central

...TE03 ABCD 0000 0000 0000 0000 0000 - Detail Central

...TE03 EFGH 0000 0000 0000 0000 0000 - Detail Central

...TE03 1111 0000 0000 0000 0000 0000 - Detail Direct

...TE03 MNOP 0000 0000 0000 0000 0000 - Detail Direct

...TE03 QRST 0000 0000 0000 0000 0000 - Detail Direct

- Standard drop down list of values
- Works for up to 500 AHCs
- AHCs appear in the list according to your selections for bill period, vendor, contract and central/direct
- Choose from summary, bill or detail levels (*note: bill applies to central only*)
- Can type in all or part of an AHC by selecting the "Begins with..." option

Select Report Criteria

Bill Period  Vendor  Contract  AHC  Begins

Break On  Central/Direct



## Federal Acquisition Service

# Popup list with filters

Select Report Criteria

Bill Period:  Vendor:  Contract:  AHC:

Break On:  Central/Direct:

Select AHC - Windows Internet Explorer

Select Agency Hierarchy Code

AHC Begins With:  AHC

Includes:

Report Type: ☒ Bill ☒ Detail ☒ Summary

Billed: ☒ Central ☒ Direct

Display:

--All--

TE\*\* 0000 0000 0000 0000 0000 0000 - Summary

...TE01 0000 0000 0000 0000 0000 0000 - Bill

...TE01 ABCD 0000 0000 0000 0000 0000 0000 - Detail Central

...TE01 DEM3 0000 0000 0000 0000 0000 0000 - Detail Direct

...TE01 EFGH 0000 0000 0000 0000 0000 0000 - Detail Central

...TE01 MNOP 0000 0000 0000 0000 0000 0000 - Detail Direct

TE03 0000 0000 0000 0000 0000 0000 - Bill

...TE03 0000 0000 0000 0000 0000 0000 - Detail Central

...TE03 ABCD 0000 0000 0000 0000 0000 0000 - Detail Central

...TE03 EFGH 0000 0000 0000 0000 0000 0000 - Detail Central

...TE03 1111 0000 0000 0000 0000 0000 0000 - Detail Direct

...TE03 MNOP 0000 0000 0000 0000 0000 0000 - Detail Direct

...TE03 QRST 0000 0000 0000 0000 0000 0000 - Detail Direct

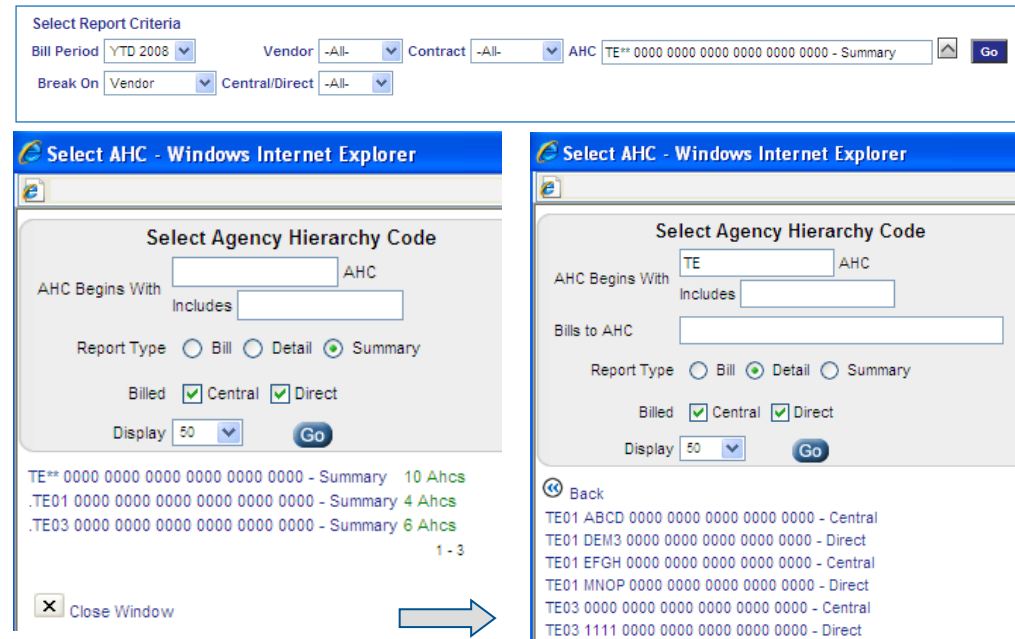
1 - 14

- AHC list appears in popup window when you click on the arrow to the right of AHC
- Works for up to 2,000 AHCs
- AHCs appear in the list according to your selections for bill period, vendor, contract and central/direct
- Filter your AHC list in the following ways:
  - Enter all or part of AHC in AHC Begins With field
  - Enter part of an AHC in the AHC Includes field
  - Check/ uncheck Report Type: Bill, Detail, Summary (*note: bill applies to central only*)
  - Check/ uncheck central / direct
  - Select number of records to display
  - Click "Go" to refresh the list based on your filters
- Click on an AHC to populate the AHC field in the Select Report Criteria box

## Federal Acquisition Service

# Popup list drilldown with filters

- AHC list appears in popup window when you click on the arrow to the right of AHC
- Works for any number of AHCs
- AHCs appear in the list according to your selections for bill period, vendor, contract and central/direct
- Filter your AHC list in the following ways:
  - Enter all or part of AHC in AHC Begins With field
  - Enter part of an AHC in the AHC Includes field
  - Select one Report Type: Bill, Detail or Summary (*note: bill applies to central only*)
  - Check/ uncheck central / direct
  - Select number of records to display
  - Click "Go" to refresh the list based on your filters
- Click on an AHC to populate the AHC field in the Select Report Criteria box



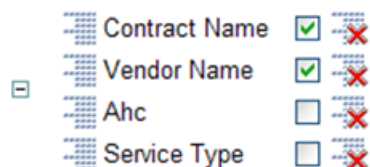
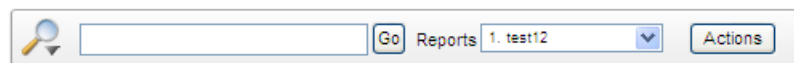
- Or click on the green number-of-record links to view the detail AHCs below a bill or summary level
- Click on an AHC to populate the AHC field in the Select Report Criteria box



# Federal Acquisition Service

# Customized Billing Reports




## Options for data analysis



- Each billing report has a custom icon along with print & download
- Click on the custom icon to access the custom query functionality

- Each custom report page includes:
  - Search bar
  - Query and format options
  - Data per query and format results

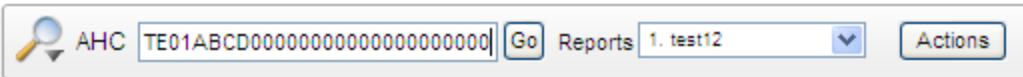
Contract Name : Enterprise, Vendor Name : Vendor2

	Ahc	Service Type	Svc Order	UBI	ASRN	CLIN	Qty	Dom Int	C/D	Orig
	TE01ABCD0000000000000000000000	SSMT	987	UBIMTTE01AB	-	0224001	10	-	C	WASHDC
	TE01ABCD0000000000000000000000	WICP	2816	UBICPTE01AB	-	0630009	1	-	C	HRNDVA
	TE01ABCD0000000000000000000000	TTFR	282	UBIFRTE01AB	TESTASRNTE01	0000000	2	-	C	WHTMM

## Federal Acquisition Service

# Customized Billing Reports

## Options for data analysis (continued)



AHC   Reports

- Use the search bar to:
  - Set filters for querying the data
  - Access saved reports
  - Access the actions menu

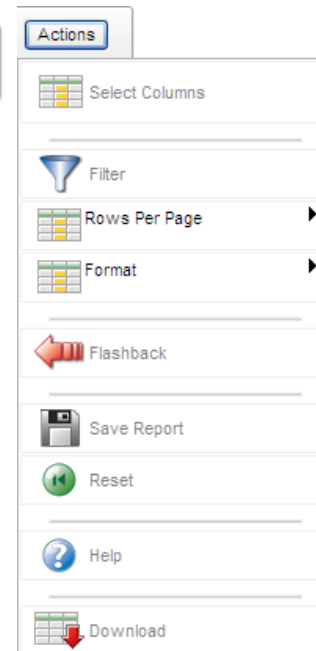


**ASRUI**

▲ ▼ ✕

TESTASRUIE01  
TESTASRUIE03

- Click on a column header to:
  - Sort on the column
  - Hide the column
  - Break the column out as a sub header
  - Filter the data in the column



**Actions**

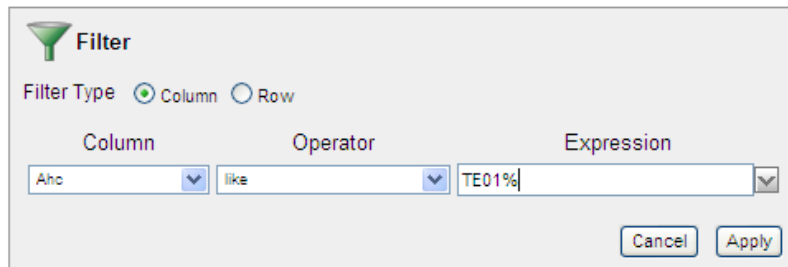
- Select Columns
- Filter
- Rows Per Page
- Format
- Flashback
- Save Report
- Reset
- Help
- Download

- Use the actions menu to:
  - Select the fields you want to include
  - Set report filters
  - Set the number of rows displayed per page
  - Format the report (see next slides for options)
  - Save your changes in a new report
  - Reset default options
  - Download data

## Federal Acquisition Service

# Customized Billing Reports

## Actions Menu - Filter



Filter

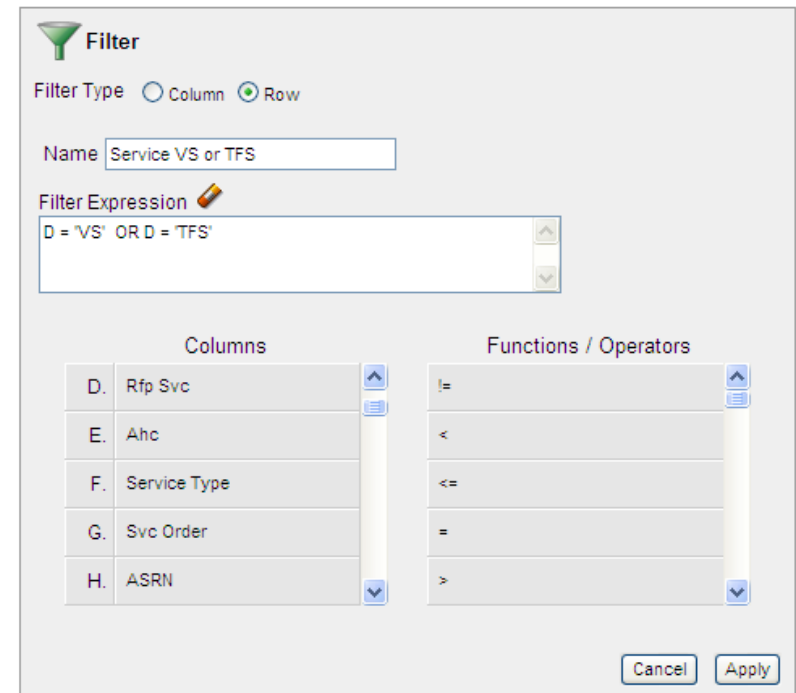
Filter Type ☒ Column ☐ Row

Column Operator Expression

Ahc like TE01%

Cancel Apply


- Filter your query on any field
  - Choose from multiple operators depending on the field selected
  - Filter for multiple data values depending on the operator
- Choose filter type Row for more complex queries
  - Enter a name for your query
  - Select columns, functions and/or operators from the lists to build your query



Filter

Filter Type ☐ Column ☒ Row

Name Service VS or TFS

Filter Expression 

D = 'VS' OR D = 'TFS'

Columns	Functions / Operators
D. Rfp Svc	!=
E. Ahc	<
F. Service Type	<=
G. Svc Order	=
H. ASRN	>

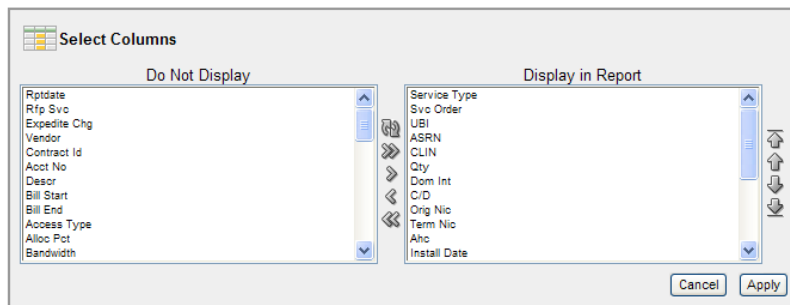
Cancel Apply



## Federal Acquisition Service

# Customized Billing Reports

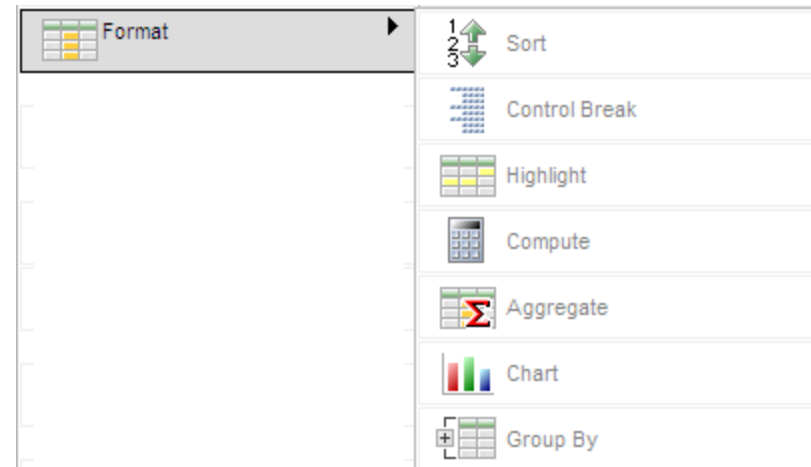
## Actions Menu – Select Columns & Format Sub-menu



- Select which columns to display
- Select the display order



- Select the number of rows per page (this is a partial screen shot – you can select more)



- Select an option from the format menu (see next slides for more information)



## Federal Acquisition Service

# Customized Billing Reports

## Actions Menu – Format (continued)

**Group By**

Group By Column

1 ASRN 2 Service Type 3 CLIN

	Functions	Column	Label	Format Mask	Sum
1	Count	CLIN	clin count	999G999G999G999G999G999G990	<input checked="" type="checkbox"/>
2	Sum	MRC	MRC	FML999G999G999G999G990D00	<input checked="" type="checkbox"/>
3	Sum	NRC	NRC	FML999G999G999G999G990D00	<input checked="" type="checkbox"/>

Sort Column Direction Null Sorting

1	1	Ascending	Default
2	2	Ascending	Default
3	3	Ascending	Default

Cancel Apply

- Summarize the data in your custom report
- This example would show the services and CLINs for each ASRN, with a count and summarized charges per CLIN
- You can toggle back and forth between your custom report and custom summary

**Sort**

	Column	Direction	Null Sorting
1	Rptdate	Descending	Default
2	Contract Name	Ascending	Default
3	Vendor Name	Ascending	Nulls Always Last
4	aho	Ascending	Nulls Always First
5	- Select Column -	Ascending	Default
6	- Select Column -	Ascending	Default

Cancel Apply

- Select which fields to sort by

**Control Break**

	Column	Status
1	Rptdate	Disabled
2	Contract Name	Enabled
3	Vendor Name	Enabled
4	aho	Disabled
5	- Select Column -	Enabled
6	- Select Column -	Enabled

Cancel Apply

- Select which fields to break out as sub-headers
- Toggle between sub-headers and report fields

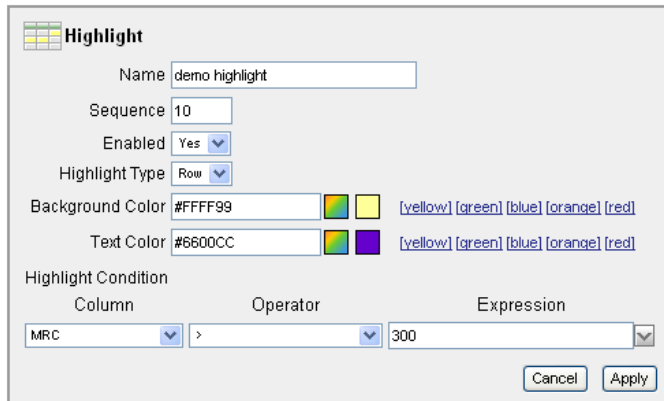




## Federal Acquisition Service

# Customized Billing Reports

## Action Menu – Format (continued) and Save Report



**Highlight**

Name: demo highlight

Sequence: 10

Enabled: Yes

Highlight Type: Row

Background Color: #FFFF99 [yellow] [green] [blue] [orange] [red]

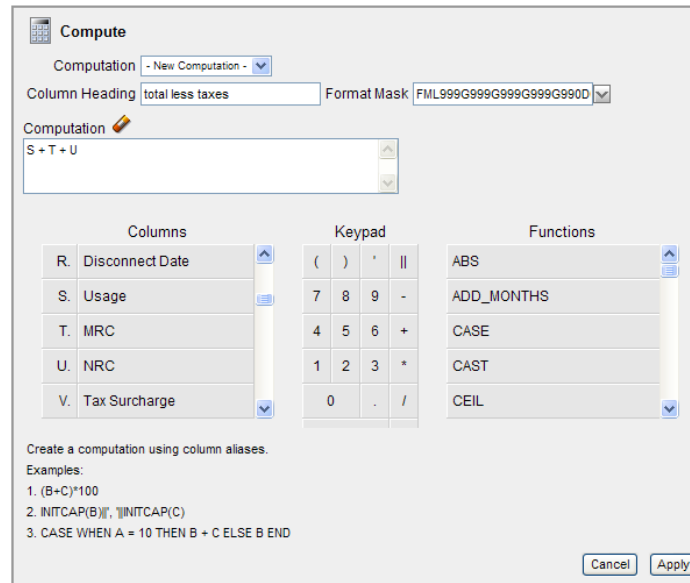
Text Color: #6600CC [yellow] [green] [blue] [orange] [red]

Highlight Condition

Column	Operator	Expression
MRC	>	300

Cancel Apply

- Highlight cells or rows per your designated data conditions
- Choose background and text colors by clicking on the color box or link
- Set the data conditions to be highlighted



**Compute**

Computation: - New Computation -

Column Heading: total less taxes Format Mask: FML999G999G999G999G990D

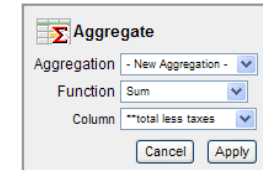
Computation: S + T + U

Columns	Keypad	Functions
R. Disconnect Date	( ) *	ABS
S. Usage	7 8 9 -	ADD_MONTHS
T. MRC	4 5 6 +	CASE
U. NRC	1 2 3 *	CAST
V. Tax Surcharge	0 . /	CEIL

Create a computation using column aliases.  
Examples:  
1. (B+C)\*100  
2. INITCAP(B)||', '||INITCAP(C)  
3. CASE WHEN A = 10 THEN B + C ELSE B END

Cancel Apply

- Add new columns based on computations of existing columns (e.g., total charges)
- Select columns and use the keypad to build the computation



**Aggregate**

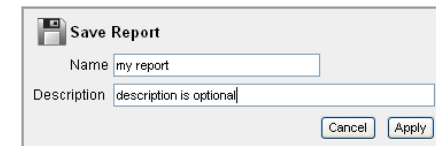
Aggregation: - New Aggregation -

Function: Sum

Column: \*\*total less taxes

Cancel Apply

- Add column totals or subtotals



**Save Report**

Name: my report

Description: description is optional

Cancel Apply

- Save the report for later use



## Federal Acquisition Service

# Customized Billing Reports

## CLIN Detail example

Go Reports 1. my report Actions

Saved Report = "my report"

- Ahc like "TE01ABCD%": ☒
- Orig Nic = "CHCGIL": ☐
- Orig Nic in "CHCGIL", WASHDC: ☐
- Orig Nic like "WASHDCBLMTS": ☒
- Contract Name: ☒
- Vendor Name: ☒
- Ahc: ☒
- mrc > 300: ☒

- Your saved report appears in a dropdown list
- Report name also appears under the tab
  - Can be deleted by clicking the X

- Filters, control breaks and highlight conditions appear above the data
  - Can be toggled on or off by clicking the check box
  - Can be edited by clicking the link
  - Can be deleted by clicking the X

Contract Name : Enterprise, Vendor Name : Vendor2

Rotdate	Ahc	ASRN	UBI	Rfp Svc	Svc Order	CLIN	Qty	C/D	Orig Nic	Install Date	MRC	NRC	Tax Surcharge	Total Charge	total less taxes
01-JAN-08	TE01ABCD00000000000000000000	-	UBIMTTE01AB	MTSS	987	0224001	10	C	WASHDC	20-JAN-08	500.00	0.00	150.00	650.00	500.00
01-JAN-08	TE01ABCD00000000000000000000	-	UBIMTTE01AB	MTSS	987	0224002	10	C	WASHDC	20-JAN-08	0.00	0.00	-45.00	-45.00	0.00
											500.00	0.00	105.00	605.00	500.00

Contract Name : Universal, Vendor Name : Vendor2

Rotdate	Ahc	ASRN	UBI	Rfp Svc	Svc Order	CLIN	Qty	C/D	Orig Nic	Install Date	MRC	NRC	Tax Surcharge	Total Charge	total less taxes
01-JAN-08	TE01ABCD00000000000000000000	-	UBIMTTE01AB	MTSS	98765446	0224002	10	C	WASHDC	20-JAN-08	0.00	0.00	-45.00	-45.00	0.00
01-JAN-08	TE01ABCD00000000000000000000	-	UBIMTTE01AB	MTSS	987	0224001	10	C	WASHDC	20-JAN-08	500.00	0.00	150.00	650.00	500.00
											500.00	0.00	105.00	605.00	500.00

1 - 4 of 4

- Fields are displayed in the order you set
- Sub-headers are broken out as you specify
- First sort is indicated by an arrow next to the field name
- Computed columns and subtotals appear as you set them
- You have the option to download the data in your report (Actions/Download)

## Federal Acquisition Service

# Manage Users Screens

- As an Agency DAR Administrator, you can act as an E-MORRIS account manager for your Agency (in addition to being an Agency user)
  - View and manage account requests submitted through the Register Now web form for your Agency Hierarchy Codes
  - Create and edit accounts for other users in your Agency
  - Assign AHCs as high as your access allows, or as low as 28 characters
  - You can not provide access outside of your own account permissions

## Federal Acquisition Service

## Manage Users Screens (continued)

- Use of these screens is OPTIONAL
  - If you have E-MORRIS access, you will get a system email when a user in your Agency requests access through the registration web form
    - Approve (or deny) the request via the Manage Users screens, OR
    - Reply to the email and GSA will manage the request
  - If you do not have E-MORRIS access, GSA will forward the request information to you via email
    - Reply to the email and GSA will manage the request
- You can also use the Multiple Users registration form



## Federal Acquisition Service

# Manage Users screen

- Manage Users screens available to Agency DAR Administrators (and GSA)
- Access the screens by clicking on the Manage Users tab
- View open account requests, password reset requests and other status information
- Click on the icon to the left of an open user request record to view details of that request
- Or navigate among the screens by clicking on the links underneath the Manage Users tab

Home > Manage Users

Home Inventory Billing Reports Manage Users

Manage Users Browse Users Edit User Browse Requests Create User

### Manage User Accounts

#### Open User Requests

Userid	Requested
another.one@agency.gov	01-OCT-08

1 - 1

#### Password Reset Requests

Userid	Time Left (Hours)
new.user@agency.gov	-3942
emorris.account@agency.gov	-3943

1 - 2

#### Failed Logon Attempts

no data found

#### Users Who Need to Change Passwords

no data found



## Federal Acquisition Service

# Browse Requests screen

Home Inventory Billing Reports Manage Users  
Manage Users Browse Users Edit User Browse Requests Create User

Home > Manage Users > Browse Requests

### Requests for Account Action

Search  Go

Open	Email Address	Name	Status	Requested
	another.one@agency.gov	One, Another	OPEN	10/01/08 14:51
	new.user@agency.gov	User, New	CLOSED	10/01/08 14:47
	emorris.account@agency.gov	Account, Emorris	CLOSED	10/01/08 14:45

1 - 3

### Details

Email Address another.one@agency.gov  
Name Another One  
Address 100 Sage Drive  
Yellowstone, WY 99999  
Phone 999-555-9090  
AHCs Requested TE01ABCD; TE03ABCD  
Modules Requested Network Billing  
User's Comments this is a test request for training  
Work Notes

Close Request Deny Request Create Account  
Remove from My List

- View details of a user request by clicking on the icon to the left of a record
- You can enter work notes if you choose
- Click on the Create Account button to create the account
- Click on the Deny Request button if you don't authorize the account
- Click on the Close Request button if, for example, the request is a duplicate
- Click the Remove from My List button if the request is not from your Agency (this will flag GSA to investigate)



## Federal Acquisition Service

# Create User screen

Home > Manage Users > Create User

Home Inventory Billing Reports Manage Users  
Manage Users Browse Users Edit User Browse Requests Create User

Return to Browse Page

### Create New User Account

#### Information

You can create a new account now.

A temporary password will be emailed to the user when the account is created. This password must be changed the first time that the user logs on.

If you have linked here from the Browse Requests page, the fields have been pre-filled for your convenience.

Userid: another.one@agency.gov  
(Email Address)

#### Contact Information

First Name: Another  
Last Name: One  
Address: 100 Sage Drive  
City: Yellowstone  
State: WY  
Zip: 99999  
Phone: 999-555-9090  
Alt. Email:  
Comments: this is a test request for training

#### Access Information

Copy Permissions from Another User Account

Model Userid: No - Do Not Use Model  
☐ Update User if Model Updated

Or, Set Permissions Individually

Modules: ☒ Agency Billing ☐ Agency NIM  
Billed: ☒ All ☐ Central ☐ Direct  
Vendors: ☒ Vendor1 ☒ Vendor2  
Contracts: ☒ All ☐ Universal ☐ Enterprise

Agency Hierarchy Codes: TE01ABCD; TE03ABCD

☒ Close Registration Request

Attach this Additional Message to the Email to the User

Create User Reset Cancel

- If you link here from the Browse Requests screen, the fields will be auto-populated with the request information.
- You can change access (e.g., lower level or additional AHCs) or create the account as requested.
- Click the Create User button to complete account set-up.
- The user will get a system email with User ID and password.
- You can add optional text to that email by entering it in the box provided (note: it will be the same font as the email, so you might want to surround it with asterisks (\*\*\*\*)).
- You can also use this screen to create a user account without starting from a registration request.



## Federal Acquisition Service

# Browse Users screen

Home Inventory Billing Reports Manage Users

Home > Manage Users > Browse Users

Manage Users Browse Users Edit User Browse Requests Create User

**Browse User Accounts**

Search  Display 15

Edit	Userid	Name	Locked	Disabled	Password Age	Model
	another.one@agency.gov	One, Another	N	N	0 days	N
	emorris.account@agency.gov	Account, Emorris	N	N	13 days	N
	emorris.user@agency.gov	User, Emorris	N	N	13 days	N
	new.user@agency.gov	User, New	N	N	13 days	N

1 - 4

- Once an account has been created, a record appears in the Browse Users list
- You can click on the icon to the left of a record to edit the account
- You can search by all or part of a User ID or Name
- You can sort on a column by clicking on the column header



## Federal Acquisition Service

# Edit Users screen

Home > Manage Users > Edit User

Home Inventory Billing Reports Manage Users  
Manage Users Browse Users Edit User Browse Requests Create User

Return to Browse Page

**Edit User Account for another.one@agency.gov**

Userid: another.one@agency.gov  
(Email Address)

**Tasks for Another One**

- Reset Password
- Remove User
- Edit Notifications
- Edit Preferences
- Make Model User
- Transfer User Management
- Copy User

**Status of Account**

Password changed 0 days ago  
Last login 0 days ago  
New - user has not logged on  
Password reset request expires in 1416 hours

**Contact Information**

First Name: Another

Last Name: One

Address: 100 Sage Drive

City: Yellowstone

State: WY

Zip: 99999

Phone: 999-555-9090

Alt. Email:

Comments: this is a test request for training

**Access Information**

Copy Permissions from Another User Account

Model Userid: No - Do Not Use Model

☐ Update User if Model Updated

Or, Set Permissions Individually

Modules: ☒ Agency Billing ☐ Agency NIM

Billed: ☒ All ☐ Central ☐ Direct

Vendors: ☒ Vendor1 ☒ Vendor2

Contracts: ☒ All ☐ Universal ☐ Enterprise

Agency Hierarchy Codes: TE01ABCD TE03ABCD

Save Reset Cancel

- Select a User ID to view an account record (or link here from the Browse Users screen)
- Edit POC or access information
- Click on links in the task box to:
  - Reset password – optional, since any user can reset using the Reset Password button on the home page
  - Remove User – delete or temporarily disable an account, as needed
  - Edit Notifications or Preferences – optional, see slide 8
  - Make Model User – optional, use same permissions for subsequent accounts
  - Transfer User Mgt – send account back to GSA, if needed

## Federal Acquisition Service

# E-MORRIS Help and Contact Info

- Contact Us link – FAS Billing Help Desk Info
  - Phone: 1-877-944-8677 (toll free)
  - Email: [fasbilling.help@gsa.gov](mailto:fasbilling.help@gsa.gov)
- User Guide link
  - Detailed user guides (depending on access)
  - E-MORRIS presentation – training overview (public access)
- Reset Password button
  - Web form for automatic password reset
- Request Assistance button
  - Web form for requesting assistance (other than password resets)